

Request for ~~Proposal~~ PARTNERSHIP

AVOIDING THE PITFALLS OF THE TRADITIONAL RFP PROCESS

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Pre-Proposal Analysis - Full Transparency Removes the Guesswork

Project Summary Goal: Explain the goal of your project and why it is needed.

[Example] Develop a new website that includes the following:

- A more interactive and personalized experience for our primary audiences
- Ability to track and monitor analytics of website pages
- Workflow process improvements such as integration with our other systems
- A clean content management system administrative backend and maintenance process
- A responsive design that supports popular modern mobile devices as well as widescreen formats
- Integration with social sites, making content more shareable
- Adaptability as new applications and technology are available
- A clean, branded print option for feature articles and press releases to be printed by end-users

Determine Services Needed: ex. Web Design, Web Development, Content Strategy, Print Materials, User Experience, Training and Documentation, etc.

Timeline: Provide a proposed timeline. Include Phased elements (Phase I, Phase II, etc). Pre-determine any known risks.

[Example]

- University Holidays
- Admissions process timeline
- Major events and initiatives
- Failing software or hardware

Budget Range: Determine an overall budget for the project, as well as price breakdown requirements for the vendors:

- Hourly/service agreement billing rates
- Line item quotations of additional items out of scope
- Pricing for any recommended hardware or software

Identifying Stakeholders and Requirements

Target Audience: Determine the primary audience and purpose. Pre-determine what the user flow will be for each audience type or what general questions they will have that the system will transparently answer.

[Example] Website Redesign, Audience Types

A. Potential Students/Faculty/Staff

- Who is ____ University/College?
- What does it look like?
- How do I get started/attend?
- How much does it cost?
- How do I contact Trinity?
- How are graduates/students doing when they leave?
- What are the people doing while they are there?
- Who are our faculty and what distinguishes them?

B. Alumni

- How can I give back?
- What benefits are available to me?
- How do I stay connected?

C. Donors/Sponsors

- Why should I give?
- How will my gift be used?
- How will my gift be acknowledged?
- What benefits do I received from giving?

D. Existing Students/Faculty/Staff

- How do I find Trinity resources?
- How do connect with other community members?
- How can I support Trinity?
- How do I let someone know there is a technical problem?

Identify primary stakeholders from each target audience group

[Example] Include at least 1-2 important stakeholders from each group and get them all in the room at one time. Conduct stakeholder interviews, document input from each group to determine project requirements and outcomes.

Determine internal stakeholders.

[Example] Conduct Interviews with internal stakeholders / team members that will have vital incite or a role during the development stages of the project:

- Developers
- System Architects
- Content Writers & Producers
- Marketing Analysts
- Creative Directors
- System Administrators

Conduct Interviews with Stakeholders

Sample Questions:

- What would you like to see out of this web redesign?
- What features of the current website are most important to you?
- What new features would you like to see?
- What role would you like to take in administering this website?
- How do you see the website making your job as a _____ easier?

Determining Top Priorities

Identify which requirements are “must haves” vs “nice to haves”

[Example]

- Easy Editing/Updating process
- A sustainable Content Management System
- SEO, Search Functionality
- Hosting options
- Technical training for administrators and editors
- Methods for revision control and database backups

If the project requires work within a current system, list all of the relevant functionality of the system that relates to the project

[Example] List of required Drupal modules or Wordpress plugins that are already in use or explain the current file revision control workflow (GIT, codebase workflow, etc).

If the project requires a new system, list all of the must have functionality and capabilities of the system

[Example] An open source solution content management system is required that has easily accessible documentation and resources.

Research, Research, and Research Partners - Avoid the Fluff

Find a vendor:

- Local, regional, or national?
- Market based vendor (i.e. higher education)
- Ask your peers and competitors - pick up the phone and call them
- Go behind the scenes - Install Wappalyzer to find out which software a website uses.

Choose Top 3 - Question, clarify, and evaluate

Gain a sense of the vendor by asking questions, and questions, and questions. Dig deeper. See if you can establish a relationship or feel comfortable with the partner before a contract is signed.

[Example Questions]

- Provide general demographic information about your company. Include number of offices, office location(s), number of employees, number of employees in web design, number of years in existence, number of years in web design, and sales.
- What are your mission and values? How do they drive your strategy?
- What is your work/office culture like? Would it jive with ours?
- Define and describe the team members that would execute a project for your University
- Define the process, project management, and team structure that would execute this type of solution.
- How will your organization ensure an internet solution meets the needs – content, usability, functionality, brand consistency, regulatory compliance (to meet ADA and Section 508 accessibility requirements and provide documentation in the form of reports), and stability.
- Describe three client references and the financial impact - savings or growth - that can be attributed to an internet solution your company has implemented.
- What are some of the various cost effective approaches your company has taken in promoting or marketing a client's website?
- Describe the process to ensure the successful completion of the project in the event that your company is acquired by another company or is involved in a major acquisition? Is your company currently involved in an acquisition?
- Is the software easy to use, maintainable, and flexible to our needs?
- Software/Program specific - ex. Drupal. What modules would you recommend that we start off with and why?